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THE EUROPEAN
ADVANTAGE

The French seafood market

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In 1999, France imported 860,976 tonnes of seafood products, valued at 3 billion euros (\$4.23 billion). Today, because of the depletion of fish stocks in coastal waters, the French catch has fallen below the 820,000 tonnes estimated for 1998 (the last year for which statistics are available) -- insufficient to meet the demand for quantity, or quality. France's population of 60 million consume an average of 25.4 kg of seafood products each year, making France one of the European Union's most attractive markets.

Market data

Seafood production -- France produces some 820,000 tonnes of products extracted or derived from the sea, lakes and rivers, including 380,000 tonnes of fresh fish, 270,000 tonnes of aquaculture products (mussels, oysters, sea-cage-farming and inland fish-culture products) and 170,000 tonnes of frozen fish.

Imports of seafood products -- Shrimp is the leading seafood import, with a value of 472 million euros, 77% of which is warm-water shrimp and 23% cold-water shrimp. Among fish imports, salmon leads the way with a value of 450 million euros, including 335 million for fresh whole salmon, followed by tuna (9%), Atlantic cod (7%), scallop (4%), lobster and crawfish (3%) and Alaska pollock (3%). France imports many other species of marine fish because of insufficient local production, including saithe, hake, sole, sea bass, monk fish and freshwater fish.

Exports of seafood products -- France exports mainly frozen and tinned tuna, as well as processed products (smoked salmon).

Distribution networks

Fresh seafood products (fresh fish and seafood) -- Supermarket sales of fresh seafood products account for some 65% of the market.

1. Fresh fish

The main species purchased are salmon, Atlantic cod, whiting, sole, pollock, trout, monk fish and ling, sold either whole or as steaks and filets. Sales were relatively stable in the past, but since the fall of 2000 when France was hit by several health crises involving beef, they have picked up and prices have been steady.

2. Fresh crustaceans

The French market features fresh-cooked cultivated shrimp, prawn, crab and lobster/crawfish. These species are sensitive to selling prices, with price increases leading to decreases in volume.

3. Fresh cephalopods and shellfish

The main species consumed are mussels, oysters and scallops, with half of the oyster consumption taking place during the year-end holiday season.

Processed seafood products -- These include catering and smoked/cured products (smoked, salt-cured and dried).

Supermarkets account for more than 90% of these products' sales, which continue to show promising growth. The largest markets are for smoked salmon and fresh surimi. The market for salt cod is subject to seasonal variations, while the market for smoked herring in brine is more stable.

Frozen products -- There has been an increase in world prices for Atlantic cod. The main products are Individually Quick Frozen (IQF) filets, breaded fish and cooked fish in sauce. The market for frozen lobster and crawfish is stable but seasonal, while the market for shrimp is more sustained.

Tinned products -- The French market for tinned products is made up primarily of tuna, sardines and mackerel, with supermarkets accounting for over 90% of sales.

Relative size of distribution networks -- Supermarkets account for some 60% of all sales of aquatic products (seafood and freshwater fish products), followed by the *restauration hors foyer* (RHF) [eating out] sector with 26%, and traditional networks (fish markets) with 14%.

According to a survey conducted by GIRA SIC of 9,000 independent, chain and institutional (e.g. school cafeteria) restaurants, consumption of aquatic products by the RHF sector totalled nearly 200,000 tonnes in 1998 for a value of 1.1 billion euros, with fresh fish leading the way (33%), followed by frozen fish (25%) and shellfish (18%).

Per-meal consumption of aquatic products is higher for people who eat out than for those who eat in. Indeed, meals eaten in restaurants account for only 16% of all meals consumed by the French but account for 26% of the sales volume of aquatic products. However, these purchases are mainly of fresh and frozen seafood products, while tinned, cured/smoked and catering products are less popular. Sales of aquatic products account for some 10% of the value of RHF food product sales. Fresh products account for 61% of this, the same as for all RHF food products. However, the share constituted by frozen aquatic products is much higher, in relation to the other product groupings, while the tinned products share is very low.

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Canadian opportunities in France

In 1999, France imported 44.2 million euros (\$62 million) worth of seafood products, or about 1.5% of French seafood imports, from Canada (source: Eurostat).

Lobster (live or frozen) is by far the leading seafood product imported from Canada, which supplies about a third of the French live lobster market and almost all of the French frozen lobster market. Live lobster is eaten mainly during the year-end holiday season, although a second high season is developing in the April-May period. The Canadian Embassy in Paris is trying to promote springtime lobster consumption in order to de-seasonalize sales. Frozen lobster sales feature lobster frozen in brine and in dry ice, as well as lobster meat and by-products, such as tomalley or lobster coral.

In terms of shellfish, the other main products are frozen crab meat and frozen scallops. Snow crab meat is very popular in France, but other species of crab are also marketed. Deep-sea scallops are popular for their large size. There is a market for roe-on deep-sea scallops, provided that they are whole and the scallops are well-scrubbed. Thanks to a tariff quota, frozen cold-water shrimp enjoy reduced customs duties. Live mussels can be exported from Canada during the off-peak production season in Europe (April-June).

Popular species of frozen fish include burbot tails, skate wings and *saumonette* (filets of certain species of shark), as well as salmon filets. Because the North Sea herring catch has dwindled, herring filets are highly prized. The salmon market has been dominated for several years by Norwegian products, and Canadian exports of frozen salmon are minimal.

Canadian freshwater fish, including pike and pike-perch (frozen whole, filets or meat), have long been very popular on the French market.

The market for salt cod and dried cod is very seasonal (Lent). There is a very large market for frozen fish blocks (Atlantic cod and Alaska pollock), but because of a lack of resources, Canada does not export these products to France.

Efforts have been made to expand shipments of fresh fish (burbot tails, skate wings, *saumonette*, Atlantic halibut), with mixed results.

In terms of processed products, there may be some opportunity for cold-smoked salmon in France. There is also a large market for lumpfish roe, but most of this product is canned in Europe.

Regulatory requirements

Canadian establishments wishing to export frozen products or fresh fish and crustaceans to the European Union must appear on the list of approved establishments pursuant to Decision 93/495. This list can be found on the **Canadian Food Inspection Agency (CFIA)** (<http://www.cfia-acia.agr.ca/>) Web site. For live molluscs, an agreement with France according to the terms of Directive 91/492 provides for another list, also posted on the CFIA site. Products must be

accompanied by an EU certificate.

The requirements concerning labelling of crates and products for sale to consumers can be complex. We recommend that exporters seek advice from trade commissioners or their importers prior to any shipment.

Customs duties

While enjoying reduced customs duties under the World Trade Organization, Canadian seafood products entering the European Union can be subject to customs duties as high as 22% of the value of the product, this at a time when many competitor nations are benefiting from preferential agreements. There are tariff quotas for several products, including cold-water shrimp and herring filets.

Importers

Depending on the product, the leading French importer can be a fresh seafood product wholesaler, a frozen product broker, a retail distribution chain or a distributor specializing in the RHF sector (restaurants, cafeterias). The Canadian Embassy maintains contact lists of importers.

Information sources

For several years, the **European Seafood Exposition**, the main trade show in this sector, has been held each April at the Brussels Exhibition Centre (Heysel) in Belgium. Web site: www.euroseafood.com.

The exposition is organized by Diversified Business Communications, the organizers of the **Boston Seafood Show**, tel.: (1-207) 842-5599, fax: (1-207) 842-5505, e-mail: food@divcom.com

To help Canadian companies export to France, the Canadian government has posted useful information on its Web site: www.infoexport.gc.ca

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